




Memorandum

To: Local Governmental Entities in Mississippi
From: David C. Johnson 
Date: May 4, 2018 (*revised May 6, 2021*)
Re: Instructions for Use for Reverse Auction Services (RFP No. 4029)

Introduction to RFP No. 4029

ITS, on behalf of the Mississippi Department of Finance and Administration (DFA), issued RFP No. 4029 for the acquisition of Reverse Auction and Electronic Bidding Services in September 2017, with an award for Reverse Auction Services published on April 11, 2018. Three of the awarded vendors have signed Master Agreements (i.e., contracted vendors) to be able to offer reverse auction services through this award:

- Central Auction House dba Central Bidding
- EASiBuy, LLC
- Unison Marketplace, Inc. formerly known as FedBid, Inc.

This multi-award, and the resulting contracts, meets or exceeds the requirements for procuring services by local governmental entities in Mississippi, when used as directed in this Instructions for Use Memorandum.

RFP No. 4029 was issued to provide local governmental entities in Mississippi with an option for implementation of the requirements in House Bills 1106 and 1109 from the 2017 Regular Session of the Mississippi Legislature. In addition, this award also complies with Senate Bill 2674 from the 2018 Regular Session, which caps the fee for services charged by “third-party service providers”.

Background for Reverse Auction Services

House Bill 1109 from the 2017 Regular Session of the Mississippi Legislature revises Mississippi Code Section 31-7-13(c)(i)(2) and requires local governmental entities to utilize reverse auctions as the primary method of receiving bids. Local governmental entities may petition the Mississippi Public Procurement Review Board (PPRB) for relief from utilizing a reverse auction on a particular procurement; however, they must seek approval of the resulting contract following the procurement by the alternative method. Mississippi law prohibits the use of reverse auctions for design and construction of public facilities, including buildings, roads, and bridges.

The requirement for the use of reverse auctions was effective January 1, 2018, and is applicable to procurements governed by Mississippi Code Section 31-7-13.

“Local Governmental Entities” as used herein means governing authorities as defined by Mississippi Code Section 31-7-1(b).

Senate Bill 2674 from the 2018 Regular Session of the Mississippi Legislature was signed into law by the Governor on March 5, 2018, and allows winning bidders to be charged a fee not to exceed 4% of the winning bid amount.

Scope

The use of this award for Reverse Auction Services is optional for local governmental entities in Mississippi. Local governmental entities using this award are not required to exclusively select a single contracted vendor (i.e., may use any or all contracted vendors for any period of time). Local governmental entities using this award will not be required to select a contracted vendor for any minimum period of time (i.e., may use any or all contracted vendors for any period of time).

The services provided through this award are limited to the provision of reverse auction services. Contracted vendors cannot offer services for roles or work traditionally performed by public servants through this award, including but not limited to solicitation preparation, requirements/specifications development, specifications research/development, prequalification of bidding vendors/suppliers, and follow-on services (i.e., services performed after the reverse auction is awarded).

Contracted vendors must offer reverse auction services for procurements valued at \$50,000.01 and above.

Master Contract Effective Dates

Master Software as a Service Agreements are in place with three of the awarded vendors. The initial 2-year term of the Agreements expired on April 23, 2020 and has now been amended to expire April 23, 2022. Contracted vendors are not allowed to require signature of any other contract documents with local governmental entities choosing to use this award.

The State reserved the right for local governmental entities to require contracted vendors to sign addendums to the Master Agreement, when additional terms and conditions are required by federal partners or for other funding agents. Any additional terms and conditions required by the local governmental entity should be executed prior to beginning use of the service.

The terms and conditions of the Master Software as a Service Agreement are included in this Memorandum. Copies of the signed Agreements are available through the MAGIC/Transparency website (URL: <https://www.msegov.com/dfa/transparency/contracts/contracts.aspx>).

Who May Use

The use of this award for Reverse Auction Services is optional for local governmental entities in Mississippi.

Mississippi state agencies cannot use this award. State agencies must use the State's Enterprise Resource Planning System, MAGIC, administered through DFA, for reverse auctions.

Dollar Limitations of Use

Fees to use the reverse auction services are paid by the bidding vendors/suppliers choosing to participate in the reverse auction. There are no fees charged to the local governmental entities using the services.

How to Use this Award

The contracted vendor pool for Reverse Auction Services intentionally offers multiple options in order to best accommodate the unknowns regarding volume of use across all local governmental entities in

Mississippi and the differences among contracted vendors in how the reverse auction services are delivered. DFA encourages your feedback when using this award.

Local governmental entities are encouraged to critically review the fee schedule below when making the decision to engage one of the contracted vendors. DFA encourages local governmental entities to contact the vendors listed below to discuss their services and the basis of their fee before selecting one for use.

Vendor Contact and Fee Information

Contact and fee information for each of the contracted vendors is included below.

Contracted Vendor	Contact Name	Contact Information
Central Auction House dba Central Bidding	Ted Fleming	(225) 810-4814 ted@centralbidding.com
EASiBuy, LLC	Scott Patterson	(330) 931-4686 scott@easibuy.com
Unison Marketplace, Inc.	Robert Delaney	(703) 738-6870 Robert.Delaney@unisonglobal.com

Contracted Vendor	Fees to Awarded Vendors/Suppliers	
	Description	Fee
Central Auction House dba Central Bidding	Fee per download of bid documents (vs supplier/vendor downloading directly from local governmental entity)	\$49.99
	Six-month subscription to download an unlimited number of bid documents (optional; offered as an additional pricing package for vendors)	\$499.99
	Annual subscription to download an unlimited number of bid documents (optional; offered as an additional pricing package for vendors)	\$699.99
EASiBuy, LLC	Awarded Supplier Transaction Fee	3% of awarded bid amount
Unison Marketplace, Inc.	Awarded Supplier Transaction Fee	4% not to exceed \$30,000.00

What Goes in Your Purchase/Audit File for Use of Reverse Auction Services

A copy of this Memorandum, along with notes made in the selection of a contracted vendor. Refer to the How to Use This Award section above.

How to Use Reverse Auction Services

How-To-Get-Started Guides for each of the contracted vendors are included in this Memorandum.

Local governmental entities using this award should download the results from each auction as soon as it is completed, such that the download is maintained as documentation of the procurement activities in accordance with the Mississippi Procurement Manual (published at this URL:

<http://www.dfa.ms.gov/dfa-offices/purchasing-travel-and-fleet-management/bureau-of-purchasing-and-contracting/procurement-manual/>) and any additional policies specific to the local entity.

At no additional charge, each contracted vendor offers training to both local governmental entities and bidding vendors/suppliers. Additionally, each contracted vendor has the capability to “onboard” your current bidding vendors/suppliers who may wish to utilize these services when bidding. Please refer to the contracted vendors’ How-To-Get-Started Guides for additional information.

To Report Problems or Request Assistance

To report problems or to request assistance in the use of this award, please contact:

- Ross Campbell, Director of DFA OPTFM, at (601) 359-2004 or Ross.Campbell@dfa.ms.gov

Copies of this document are available on the Internet at: <http://www.dfa.ms.gov/dfa-offices/purchasing-travel-and-fleet-management/reverse-auction-and-electronic-bidding-services/>.

How-to-Get-Started Guide: Central Auction House dba Central Bidding



CENTRALBIDDING

FROM CENTRAL AUCTION HOUSE

HOW TO GET STARTED GUIDE FOR MISSISSIPPI VENDORS USING RFP #4209

Central Bidding works to assure all local governmental agencies are provided the tools for success when using our electronic bidding and reverse auction services. We believe this begins with a proper introduction to our services as well as in-depth, pertinent and onsite training when a local governmental agency is ready to begin using our services.

Central Bidding begins by setting up a web page for each local governmental agency within the Central Bidding Web Site. To set up the individual web page for each local governmental agency, the local governmental agency can call or email Finley Ward, Central Bidding Sales Representative for Mississippi (225) 333-9572, finley@centralbidding.com. The information Finley will require include the following:

1. Name of the local governmental agency (as you want it to appear on your web page)
2. Logo or likeness of the local governmental agency (as you want it to appear on your web page)
3. Contact name for person responsible for the local governmental agency (main contact for electronic bidding and reverse auction services).
4. Email address for the person responsible for the local governmental agency (main contact for electronic bidding and reverse auction services).
5. Phone number for the person responsible for the local governmental agency (main contact for electronic bidding and reverse auction services).
6. Physical address for the person responsible for the local governmental agency (main contact for electronic bidding and reverse auction services).

Once the web page for the local governmental agency is completed, Central Bidding is ready to set up training with the local governmental agency. This can be set up by calling or emailing Finley Ward, Central Bidding Sales Representative for Mississippi (225) 333-9572, finley@centralbidding.com. Central Bidding suggests onsite, in person training for each local governmental agency at the time when the local governmental agency is prepared to use the specific service. It is rare when an agency will be ready to upload an electronic bid and a reverse auction at the same time, so it is the suggestion of Central Bidding to schedule training sessions specific to each service at the time when the local governmental agency is ready to use that service. Training typically requires 30 to 45 minutes. Training requires access to the internet (Wi-Fi or an internet connected device).

Central Bidding will also set up credentials for as many users as requested by the local governmental agency. This is discussed at the time of the first training session. Users can be added and deleted at the direction of the local governmental agency.

Note regarding heading above: The RFP reference should be 4029 (rather than 4209).

How-to-Get-Started Guide: EASiBuy, LLC

ONBOARDING WITH EASIBUY

- 1) Submit your (ITS templated) order form via email to support@eauctionservices.com. Once submitted, an EASiBuy representative will contact you.
- 2) Establish your Users. You will be provided with a template document wherein you will specify two types of users: a) **Admin** – Have "edit" access to all events for your organization; and b) **Basic** – Can access any event where an "admin" user has configured them as a member.
- 3) EASiBuy will establish your users in the system and schedule a kick-off call to review the basics.
- 4) On this kick-off call, you will cover: a) Knowledge Base access; b) Help desk ticket system; c) Available support packages; and d) System basics
- 5) Once you have started using the system, EASiBuy remains available for many levels of support engagement. A representative is always happy to assist you.

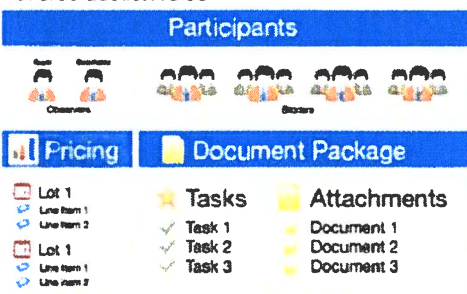
SOFTWARE OVERVIEW

This guide will introduce the concepts used throughout the software. We recommend reading this overview completely prior to diving in and using the software.

Please note: The terminology we use throughout this guide is appropriate for a reverse auction. The software is capable of running forward auctions as well. In these cases, the auction originator and bidder roles are reversed. Therefore, in a **Reverse Auction**, the Originator is known as the Buyer, while the Bidder is the Seller. For a **Forward Auction**, the Originator would be the Seller, with Bidders as Buyers.

EVENTS

Events are the container for everything that happens during the sourcing process. They provide a mechanism for managing who will participate in the process, publishing documents and receiving responses, and collecting pricing in reverse auction format, as well as electronic price collection without reverse auction rules.



Here, we see a visual representation of all the components within an event. Let's take a closer look:

PARTICIPANTS

Participants are the people who will interact with the software throughout the sourcing event. What a participant sees is determined by what role they will play in the sourcing event.

Bidders review and respond to document packages and place bids.

Editors are Buyer staff who have the ability to make changes to the event.

Observers are Buyer staff who have read-only access to an event.

As you progress through the sourcing event, participants will move through "stages". These stages are used to control bidder access to document packages and the price submission interface.

DOCUMENT PACKAGES

Document packages provide a means for buyers to publish information and files, and for bidders to respond by completing tasks and uploading files. An important aspect of document packages is their access level. Access to document packages can be limited to participants of a particular stage. This allows you to progressively release documents to groups of bidders as they pass through from stage to stage.

Bidders interact with document packages by completing tasks and uploading attachments. Observers are able to see bidder responses, and editors are able to "flag" tasks that are not compliant. These flagged items will be reflected on the bidder's interface, indicating to them that they need to address deficiencies.

LOTS & LINE ITEMS

Line items are the things you intend to purchase, which are organized into lots. You create lots and line items either through the web interface, or by uploading them using an auction layout spreadsheet.

When bidders submit pricing, they log in to the bidding interface, and select a lot. From there, they can submit prices on individual line items, or they can upload a spreadsheet with all their bids at once. The bids placed are validated against the auction rules, and bidders receive feedback in real time.

REVERSE AUCTIONS & ELECTRONIC BIDDING EVENTS

During the eProcurement, buyers use the observer interface to monitor the bid. This interface provides a means to monitor and control a procurement. From this screen, buyers are able to pause the event, see which bidders are logged in, and monitor the time remaining.

Bidder Overview - Sums all baseline and bid information for each bidder, displaying overall rank, bid, and savings information.

Line Item Overview - Shows the 1st place bid for each line item, with bid and savings information.

Line Item Detail - Details information for a specific line item, including each bidder, bid amount, and savings information.

Together, these views provide a comprehensive, live-updated view into auction performance.

REPORTING

Reports provide information about auction activity and bidding results. Once the bid has closed, buyers can run reports in several formats. Each format provides a different level of detail, with some reports focused on statistical auction performance, and others focused on providing a comparison of pricing submitted by suppliers: a) **Event** – Overview providing auction activity information; b) **Lot** – Ranked bid tabs with audit log of all bids placed in an event; c) **Line Item** – Ranked bid tabulations and an audit log for a specific line item; and d) **Bidder** – Comprehensive, side-by-side report of all bidders and all lines.

RECAP / Sample Sourcing Event Workflow



How-to-Get-Started Guide: Unison Marketplace, Inc. formerly known as FedBid, Inc.



www.unisonmarketplace.com

How to Post a Buy

Login to the Marketplace: registration is quick and easy – send your name, email address, phone number and company name to your Account Manager:

Robert Delaney
Robert.Delaney@unisonglobal.com
703.738.6870

SECTION 1: START BUY

Create a New Buy: Complete 6 sections to post your buy; 1) Start Buy, 2) Select Category, 3) Line Items, 4) Buy Terms, 5) Additional Info and 6) Confirm Buy.

Start Buy: First, complete the Start Buy section, then click 'Continue'. This section is for administrative information such as the 'Buy Description' and 'End Date and Time'.

SECTION 2: SELECT CATEGORY

Select Category: Choose a product or service category that best fits your purchase. This is for reporting and vendor notification.

SECTION 3: LINE ITEMS

Line Item(s): Enter a Line Item description detailing exactly what you need. Add as many line items as you need.

Buy Terms: Buy Terms are automatically populated. You can also add or remove Buy Terms. This helps keep the Sellers' Bids compliant.

SECTION 4: BUY TERMS

[illegible]

Additional Info: Fill out additional information such as, a Target Price, Bid Decrement, Suggested Seller(s), Shipping Information and Attachments

SECTION 5: ADDITIONAL INFO

Target Price Information

Current Target Price: \$10.00

12-Month Target Price: \$10.00

24-Month Target Price: \$10.00

Target Price History:

Month	Target Price
12/1/2010	\$10.00
11/1/2010	\$10.00
10/1/2010	\$10.00
9/1/2010	\$10.00
8/1/2010	\$10.00
7/1/2010	\$10.00
6/1/2010	\$10.00
5/1/2010	\$10.00
4/1/2010	\$10.00
3/1/2010	\$10.00
2/1/2010	\$10.00
1/1/2010	\$10.00

Confirm Buy: Review all buy information for accuracy and if necessary, return to previous sections for editing.

SECTION 6: CONFIRM BUY

Confirm Buy Information	
New Contract	400000
Contract Description	300000
Exchange	25000000
Settlement Method	Buy New Contract
Trade Date	12/04/2017
End Date	11/01/17
Broker/Counterparty	New York Contract
Product/Instrument	Contract
Contract Vehicle	Contract
Related Party	Contract
Initial Contract	Contract

Congratulations – you did it!

Feel free to check on your Buy's progress in the 'Open Buys' tab on your dashboard or simply leave it in our hands! For questions, contact Robert Delaney at 703.738.6870.

Marketplace.

Right product, right price, right time.

Unison Marketplace is an all-encompassing online purchasing platform that assists Buyers in purchasing the goods and services needed to fulfill their procurement strategies.



Buyers gain unique and powerful insight into customer needs, vendors' offerings and performance history.



Buyers save time with a simplified process that helps ease administrative burdens and delivers full documentation.



Advanced, customized reporting for complete organizational oversight into Buyer performance metrics.



Sellers access thousands of public and private opportunities to compete and win on a level playing field.

Key Features

The Unison Marketplace provides Buyers and Sellers with a comprehensive set of functionalities and support services to facilitate all stages of the procurement process.

- Unison's Marketplace enables Buyers to solicit Bids for product and service purchases
- Streamlined workflow to guide Buyer through the procurement process
- No-risk guarantee
- Dedicated account team for every Buyer
- Documentation detailing all information for easy e-filing
- Data feeds and AI algorithms that identify and assess suppliers along multiple dimensions
- No upfront expenses or investments
- Leverage various procurement workflows to fit your needs

Top Categories

From sunscreen and snowmobiles to elevator inspections and landscaping, Unison Marketplace hosts and manages Buys for a huge range of products and simple services.



IT/Hardware



Communication
Equipment



Subsistence



Telecom



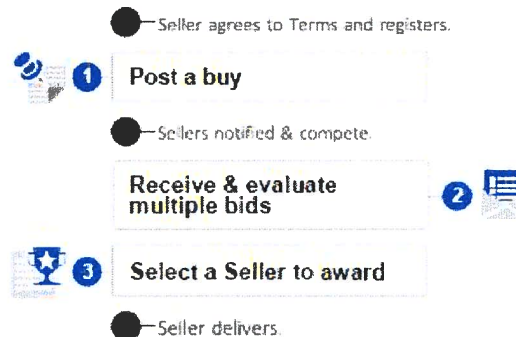
Furniture

How it works

- 1 Post a requirement using a simplified, streamlined process.
- 2 Compete on a marketplace where Unison manages the sourcing process and drives competition among qualified Sellers.
- 3 Award to the Seller of your choosing.

There are no upfront costs. There is no set-up, installation, or training needed, and there is no obligation to make an award at the completion of the bidding process.

Unison Marketplace provides a streamlined solution that compliments your current procurement process and saves on average 8 working hours per requirement.



What Makes a Buy Successful?

■ The 3 C's



Clear Specifications



Competitive Supply Base



Compelling Spend

Top Product & Service Categories in 2018

Unison Marketplace's hosts and manages Buys for a huge range of products and simple services.

Category	Avg. Sellers	Cost Avoidance	Category	Avg. Sellers	Cost Avoidance
23 - Ground & Motor Vehicles, Trailers	4.5	9%	70 - IT Equipment, Software, Supplies	4.2	10%
39 - Materials Handling Equipment	5.5	10%	71 - Furniture	5.5	21%
84 - Clothing, Individual Equipment, and Insignia	7.5	16%	74 - Office Machines, Text Processing Systems and Record Equipment	5.5	15%
58 - Communication, Detection, and Coherent Radiation Equipment	4.9	8%	1 - Maintenance, Repair, and Rebuilding of Equipment	2.5	12%
59 - Electrical and Electronic Equipment Components	6.2	10%	78 - Recreational and Athletic Equipment	5.1	14%
66 - Instruments and Lab Equipment	4.3	8%	42 - Fire Fighting and Safety Equipment	6.2	9%
67 - Photographic Equipment	6.4	11%	D - IT and Telecom	3.0	8%
69 - Training Aids and Devices	4.0	9%	75 - Office Supplies and Devices	8.7	18%